INDUSTRY CONCENTRATION

Textile Mills & Apparel/Related Products Manufacturing Plants (Selected Types) By Employment Size Class, 1981
(continued)

Selected types: (cont'd.)	Total Number	Total %	% of Total By Employment-Size Class Under 50	50-99	100-249	250-499	500 & over
Textile finishing, except wool							
Mills	653	100.0	63.7	13.8	12.6	5.8	4.1
No. of employees	63,706	100.0	10.1	10.5	20.8	22.4	36.2
Yarn & thread mills							
Mills	680	100.0	30.1	13.4	34.4	15.3	6.8
No. of employees	123,790	100.0	2.9	5.5	31.6	28.8	31.2
Apparel & other textile products, total							
Plants	21,890	100.0	72.9	12.5	10.1	3.5	1.0
No. of employees	1,229,009	100.0	20.1	16.4	28.7	20.9	13.9

Note: Includes only establishments with payroll.

Source: Based on U.S. Bureau of the Census, County Business Patterns, 1981.

Leading Companies

Leading Fiber Companies: Sales & Net Income, 1981, 1982
(Millions of Dollars)

	Sales 1982	Sales 1981	% Change 1982/1981	Net Income 1982	Net Income 1981	% Change 1982/1981
Du Pont*	$33,331	$33,000	- 1.0%	$ 894	$1,401	- 36.2%
Monsanto	6,325	6,947	- 9.0	370	445	- 16.9
Allied Corp.	6,170	6,410	- 3.8	617	834	- 26.0
American Cyanamid	3,454	3,649	- 5.4	132	197	- 33.0
Celanese	3,062	3,752	- 18.4	(34)	144	--
Total	52,342	53,758	- 2.6	1,979	3,021	- 34.5

Source: Daily News Record (February 17, 1983)

INDUSTRY CONCENTRATION

Leading Companies

Leading Publicly-Owned Textile Companies: Sales & Net Income, 1981, 1982
(Millions of Dollars)

	Sales		Net Income	
	1982	1981	1982	1981
Burlington*	$2,775.6	$3,276.2	$ 40.6	$115.5
J.P. Stevens*	1,784.9	2,033.3	7.6	(38.5)
West Point Pepperell	1,103.3	1,212.7	44.2	39.2
Springs Industries	874.6	917.0	43.1	40.0
Collins & Aikman	657.2	675.4	21.0	18.6
Fieldcrest	492.0	526.2	10.4	9.5
Cone Mills	608.2	667.5	12.8	33.7
Lowenstein	536.7	601.3	15.5	17.4
Dan River	519.1	634.8	(8.7)	14.5
Riegel Textiles*	408.5	436.0	9.8	20.0
Avondale*	260.8	282.4	2.9	2.3
Graniteville	256.6	343.2	(9.8)	(2.0)
The Bibb Co.*	235.2	247.3	5.3	2.4
Total	10,512.4	11,853.3	194.6	272.8

( ) = parenthesis denote a loss.

* = Fiscal periods have been adjusted to closely coincide with the calendar year.

Note: Milliken is not listed as it is privately held, but has sales of well above $2 billion a year.

Source: Daily News Record, March 17, 1983

Leading Apparel Companies (Publicly-Owned)
Sales & Net Income, 1979, 1982
(Millions of Dollars)

	Sales*		Net Income*	
	1982	1979	1982	1979
Levi Strauss	$2,572.2	$2,103.1	$126.6	$191.5
Blue Bell	1,292.2	1,029.5	37.3	67.3
Consolidated Foods	1,017.0	236.0	74.0	nr
Gulf + Western	925.0	449.4	nr	nr
Interco	899.2	731.3	104.8	nr
V F Corporation	879.5	544.3	91.6	38.8
Cluett Peabody	867.4	671.6	23.7	17.3
General Mills	657.3	275.0	101.7	nr
Northwest Industries	642.4	492.0	81.8	nr
Kellwood Company	606.8	521.1	8.2	4.4
Warnaco	493.6	448.3	24.1	16.6
Palm Beach Co.	491.0	323.7	9.5	13.8
Hartmarx	490.2	239.7	57.1	nr

(continued)

INDUSTRY CONCENTRATION

Leading Companies

Leading Apparel Companies (Publicy-Owned)
Sales & Net Income, 1979, 1982
(Millions of Dollars)

	Sales*		Net Income*	
	1982	1979	1982	1979
Oxford Industries	$ 435.9	$ 253.3	$ 16.3	$ 6.9
Phillips-Van Heusen	431.1	327.0	7.3	8.9

* Includes only apparel manufacturing sales volume and income.

nr = not reported.

Source: Kurt Salmon Associates, Inc.

FINANCIAL RESULTS

Based on information issued by the Federal Trade Commission, net sales of corporations in the textile mill products industry in 1982 declined 13.7% compared with 1981, reaching $48.3 billion. Net profits were down 26.4% in 1982.

In the first quarter of 1982, textile mill products industry profits on sales slipped to 1.1%, down from 1.7% in the previous quarter. In the first quarter of 1983, profits had improved to 2.3%, then rose to 3.9% of sales in the second quarter of 1983.

An analysis of results of 48 public textile companies by Kurt Salmon Associates showed a 9.3% drop in composite net sales in 1982 compared with 1981 as the recession took its toll. After-tax income before a one-time adjustment for extraordinary items was 47% lower than in 1981. One out of every four companies profiled reported a loss for 1982.

In spite of the severe recession, the apparel companies analysed by Kurt Salmon (66 publicly-held firms) managed a profit gain of 2.3% while sales were up by only 0.2%--matching the gain in wholesale apparel prices for the year. A rise in selling, general and administrative expenses brought total operating earnings in 1982 to a level 8.4% below 1981.

Textile Mill Products	Annual Average		1st Qtr.		2nd Qtr.	
	1982	1981	1983	1982	1983	1982
Net profits after taxes						
Per dollar of sales	2.1%	2.4%	2.3%	1.1%	3.9%	1.4%
On total assets	3.7	4.7	4.1	1.8	7.3	2.5
On stockholders' equity	6.9	9.4	7.8	3.7	14.2	4.8

Source: American Textile Mfrs. Institute, based on Dept. of Commerce Quarterly Financial Reports.

FINANCIAL RESULTS

While composite results on industry performance may be helpful for some purposes, it should be noted that the textile industry in particular, as well as the apparel industry, is composed of many different types of manufactures, with different cyclical patterns and subject to different pressures in terms of imports, changes in demographic patterns, housing starts, auto sales, etc.

Industry Segment Results, 1981, 1982
(Based On An Analysis of 48 Top Performing Textile Companies, 66 Apparel Companies)

	% Change in Sales 1982/1981	% Net After Tax Income On Sales 1982	1981	% Return on Total Equity 1982	1981
Textiles-composite	- 9.3%	2.35%	2.65%	6.72%	8.54%
Yarns (spun & textured)	- 3.5	2.73	3.46	2.73	3.46
Home consumer products	- 3.3	1.52	1.90	6.17	8.20
Fabrics	- 14.3	3.40*	2.82	8.60	8.86
Diversified	- 9.0	2.02	2.43	5.84	7.75
Other textile products	- 9.7	2.67	4.69	6.15	11.63
Apparel-composite	+ 0.2	3.43	3.36	11.87	12.27
Women's wear	+ 4.1	2.33	1.79	9.12	7.08
Men's wear	+ 2.5	2.37	1.78	9.18	7.09
Diversified	- 1.3	4.22	4.37	13.69	15.23

* = 1.05 before extraordinary items.

Source: Kurt Salmon Associates, Inc.

INDUSTRY LOCATION

Textile Mill Products

Employment in the textile industry has moved southward over the post-World War II period. Presently the greatest concentration of mills is in the Carolinas and Georgia which, combined are estimated to account for 60% of the industry's employment.

The latest official government data on employment by state and region in the textile mill industry is covered below.

INDUSTRY LOCATION

Textile Mill Products

Textile Mill Industry by Leading States

	No. of Mills	Employment (Thousands)		Value Added by Manufacture (Millions of $)	
	1977	1978	1977	1978	1977
North Carolina	1,375	243.4	245.3	$4,605.9	$4,267.4
South Carolina	434	133.9	139.1	2,699.8	2,468.3
Georgia	695	116.3	116.6	2,579.7	2,433.8
Virginia	101	44.2	43.0	922.0	850.1
Pennsylvania	542	45.7	46.8	900.8	803.8
Alabama	178	38.8	42.3	745.5	685.4
New York	1,250	42.2	43.0	663.0	756.9
Massachusetts	285	27.1	26.3	594.0	522.2
New Jersey	532	23.7	23.4	475.0	453.1
Tennessee	172	27.9	27.1	435.9	426.5
Rhode Island	201	13.3	12.8	262.3	215.9
Ohio	86	6.1	7.2	167.0	182.2
Leading States total	5,851	759.6	772.9	15,051.2	13,308.7
U.S. Total	na	861.8	875.7	17,130.9	16,104.5
Leading States percent of U.S. Total	na	88.1%	88.3%	87.6%	82.6%

na = not available

Source: U.S. Bureau of the Census, Annual Survey of Manufactures, 1978 M(78)-AS(6) (September 1981)

The Textile Mill Products Industry by Region, 1972, 1977

	No. of Mills		Employment (Thous.)		Value Added by Mfr. (Mil. $)	
	1977	1972	1977	1972	1977	1972
U.S. Total	7,202	7,203	875.7	952.7	$16,104.5	$11,718.0
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Regions						
New England	10.1	11.5	7.6	8.0	7.8	8.4
Middle Atlantic	32.4	35.8	13.4	15.4	12.9	16.5
East North Central	3.8	3.8	2.3	2.5	3.1	3.4
West North Central	0.5	0.9	0.4	0.4	0.4	0.4
South Atlantic	38.7	36.4	62.8	61.1	63.2	59.1
East South Central	5.6	5.3	9.5	9.4	8.3	8.4
West South Central	2.3	1.7	1.8	1.4	1.8	1.4
Mountain	--	0.4	--	--	--	0.2
Pacific	6.6	4.3	2.2	1.5	2.5	2.2

Source: Based on U.S. Bureau of the Census, 1977 and 1972 Census of Manufactures.

INDUSTRY LOCATION

Apparel & Other Textile Products

The U.S. Department of Commerce reported in the 1983 Industrial Outlook apparel plants are located in every state, but 59% are located in New York, California, Pennsylvania and New Jersey. New York remains by far the largest state for employment and value added by manufacturer, accounting for 15% of total industry employment and 19.4% of value added in apparel manufacturing.

Sectors of the industry that produce clothing requiring intricate manufacturing operations and frequent style changes are generally located in the Middle Atlantic states and California, according to the U.S. Department of Commerce. Industries that are basic and require fewer changes are more commonly reported to be in Southern states.

The Apparel & Other Textile Products Industry, by Leading States

	No. of Mills	Employees (thousands)		Value Added by Manufacture (Millions of $)	
	1977	1978	1977	1978	1977
New York	7,824	198.4	214.4	$4,134.9	$3,888.9
California	4,288	105.3	101.1	1,998.9	1,770.5
Pennsylvania	1,978	130.5	132.6	1,680.4	1,605.8
Georgia	620	76.9	76.2	1,115.1	992.4
Texas	922	75.1	73.4	1,092.3	1,038.7
North Carolina	700	78.0	77.1	1,024.5	851.9
Tennessee	443	71.0	69.9	932.4	919.1
Michigan	241	25.9	25.5	901.1	820.6
New Jersey	1,924	55.5	59.7	896.4	861.9
Alabama	345	53.1	53.9	729.8	625.3
Massachusetts	768	40.6	42.4	672.8	678.6
Virginia	287	36.5	37.0	574.3	475.6
Leading States total	20,340	946.8	963.0	15,287.0	14,529.5
U.S. total	na	1,321.8	1,334.3	21,287.0	19,671.3
Leading states percent of U.S. total	na	71.6%	72.2%	74.0%	73.9%

na = not available.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1978

Over the past twenty years the general trend in the apparel industry has been for the relocation of plants away from the Middle Atlantic states toward the South. According to a study by Kayser-Roth (WWD 2/1/83), the Middle Atlantic region has registered a decline of 33% in apparel employment between 1968 and 1983. Southern states, on the other hand, have increased apparel employment by 23% during this same period. This study projects that by 1993, employment in the Middle Atlantic region will be 50% lower than at present, while Southern apparel employment will fall 14%. These estimates reflect an expected 20% drop in apparel industry employment overall.

INDUSTRY LOCATION

Apparel & Other Textile Products

The latest official government information on employment in the apparel industry comes from the U.S. Bureau of the Census and covers the years 1977 and 1972, as covered below.

The Apparel & Other Textile Products Industry by Region, 1972, 1977

	No. of Plants		Employment (Thousands)		Value Added by Mfr. (Mil. $)	
	1977	1972	1977	1972	1977	1972
U.S. Total	26,505	24,438	1,344.4	1,368.3	$19,671.3	$13,487.5
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Regions						
New England	4.7	5.3	4.7	5.1	5.0	5.4
Middle Atlantic	44.4	51.6	32.2	34.6	33.4	38.2
East North Central	5.7	6.3	6.6	6.7	9.8	9.1
West North Central	3.0	3.0	3.6	3.6	3.6	3.6
South Atlantic	13.3	11.7	21.0	21.4	17.7	18.2
East South Central	4.4	3.9	14.1	13.1	12.0	10.8
West South Central	5.0	4.1	8.0	7.4	7.3	6.2
Mountain	1.5	1.3	1.4	1.1	1.3	0.9
Pacific	18.0	12.8	8.4	7.0	9.9	7.6

Source: Based on U.S. Bureau of the Census, 1977 and 1972 Census of Manufactures.

New York City

Despite a drop of 5.5%, or 8,000, in the number employed last year, the apparel and related products industry is still the largest employer in manufacturing in New York City. In 1982, employment in the industry averaged 129,200, according to the New York State Department of Labor, compared with 137,200 in 1981 and 140,200 in 1980.

The decline followed nationwide industry trends, and New York City's share of total apparel industry employment was the same, at 11%, in both 1982 and 1980. The industry in New York City accounted for 28.2% of total manufacturing employment and 3.8% of all employees in the city in 1982.

Broadly defined--including apparel, accessories and toiletries--the fashion industry in New York City is rated as the third largest employer, behind business services (advertising, marketing, management consulting) and wholesale trade. (Women's Wear Daily, May 12, 1983)

FIBER/PRODUCTION/CONSUMPTION

The Textile Economics Bureau reported that in 1982, domestic production of man-made fibers fell dramatically from the levels recorded in 1981. The 7.9 billion pounds of man-made fiber produced in 1982 was 19.1% less than the total recorded in the previous year, according to the TEB.

Due to the combination of improved demand as 1983 continues, and plant closings during the recent recession, the U.S. man-made fiber industry is experiencing a sharp increase in capacity utilization rates with most analysts forecasting a bright future in the industry. The Federal Reserve Board index on production for August 1983 was up 1.2% compared with the previous month and 25.9% over the August 1982 level.

Many analysts agree that the total poundage of man-made fibers produced in 1983 will fall short of the record for 1981 due to the loss of 350 million pounds of capacity in noncellulosic fibers in 1982 (a decline of 3.7%). In the April/May period of 1983, the shipment-to-capacity ratio for all man-made fibers was 80%, about 10% more than the 1982 average. Although this increase is credited primarily to inventory replenishment, many analysts expect increased retail demand to allow producers to remain at least at this level (Daily News Record, June 14, 1983).

Generally, trade observers expect fiber consumption in 1983 to be well above 1982, but the annual total is expected to fall about 1 billion pounds short of the 12.5 billion market set in 1973 and repeated in 1979.

Market sources indicate that capacity usage among U.S. man-made fiber producers continued strong in September 1983, at an average of 85.4%. In September of 1982, the capacity utilization rate was at only 71.7%. This capacity utilization puts man-made fiber producers at a higher rate than the total for all industries which the Federal Reserve Board reported to be at the 78.1% level in September 1983. The gain in capacity utilization has been achieved despite mixed results in specific fiber categories for the month. Six measured categories registered production gains, five recorded declines and one, nylon staple, continued to show full capacity usage specifically due to the strong performance of the residential carpet market.

U.S. Man-made Fiber Production, 1981, 1982, 1st Qtr. 1983/1982
(Millions of Pounds)

	January-March 1983	January-March 1982	% Change Jan./Mar. 1983/1982	1982	1981	% Change 1982/1981
Total	na	na	--	7,943.5	9,817.1	- 19.1%
Cellulosic total	na	na	--	584.4	770.1	- 24.1
Yarn	na	na	--	228.4	305.5	- 25.2
Rayon	na	na	--	33.2	48.5	- 31.5
Acetate	50.3	52.9	- 4.9%	195.2	257.0	- 24.0
Staple & tow	na	na	--	356.0	464.4	- 23.3
Rayon	92.6	96.2	- 3.7	355.0	460.6	- 22.9
Acetate	na	na	--	1.0	4.0	- 75.0

(continued)

U.S. Man-made Fiber Production, 1981, 1982, 1st Qtr. 1983/1982
(Millions of Pounds)
(continued)

	January-March 1983	January-March 1982	% Change Jan.-Mar. 1983/1982	1982	1981	% Change 1982/1981
Noncellulosic, total	1,687.8	1,650.0	--	6,459.9	8,005.9	- 19.3%
Yarn & monofilaments	801.1	785.4	--	3,057.4	3,814.8	- 19.9
Nylon	311.5	299.9	+ 3.9%	1,241.6	1,580.7	- 21.4
Olefin	166.8	154.3	+ 8.1	585.2	642.9	- 9.0
Polyester	322.8	331.5	- 2.6	1,213.6	1,569.2	- 22.7
Other	--	--	--	17.0	22.0	- 22.7
Staple, tow & fiberfill	886.7	864.6	+ 2.6	3,402.5	4,191.1	- 18.8
Nylon + aramid	196.4	140.5	+ 39.8	685.0	751.8	- 8.9
Acrylic + modacrylic	160.4	149.6	+ 7.2	624.1	690.8	- 9.7
Polyester	492.0	528.7	- 8.7	1,955.2	2,606.5	- 25.0
Olefin + vinyon	37.9	35.8	+ 5.9	138.2	142.0	- 2.7
Textile glass fiber	245.1	207.6	+ 18.1	899.2	1,041.1	- 13.6

na = not available

Source: Textile Economics Bureau, Textile Organon (March, 1983).

U.S. Consumption of Fibers 1978-1982
Total, Per Capita & Percentage Distribution by Fiber

	Mill Consumption #			Domestic Consumption ##		
	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)
Total, all fibers*						
1978	12,389.4	100.0%	55.7	13,190.9	100.0%	59.3
1979	12,656.5	100.0	56.2	12,920.7	100.0	57.4
1980	11,928.4	100.0	52.4	12,055.9	100.0	53.0
1981	11,562.0	100.0	50.3	12,264.1	100.0	53.4
1982(p)	10,143.5	100.0	43.7	11,136.7	100.0	48.0
Cotton						
1978	3,040.6	24.5	13.7	3,528.7	26.8	15.9
1979	3,077.2	24.3	13.7	3,343.5	25.9	14.9
1980	3,036.4	25.5	13.3	3,319.1	27.5	14.6
1981	2,715.5	23.5	11.8	3,310.1	27.0	14.4
1982(p)	2,487.9	24.5	10.7	3,131.7	28.1	13.5

(continued)

U.S. Consumption of Fibers 1978 - 1982
Total, Per Capita & Percentage Distribution by Fiber
(continued)

	Mill Consumption #			Domestic Consumption ##		
	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)
Wool						
1978	115.3	0.9%	0.5	235.1	1.8	1.0
1979	117.0	0.9	0.5	214.1	1.7	1.0
1980	123.4	1.0	0.5	212.7	1.8	0.9
1981	138.6	1.2	0.6	239.9	2.0	1.0
1982(p)	114.8	1.1	0.5	215.1	1.9	0.9
Rayon & acetate						
1978	870.6	7.0	3.9	898.4	6.8	4.0
1979	822.6	6.5	3.7	824.6	6.4	3.7
1980	733.0	6.2	3.2	720.8	6.0	3.2
1981	701.3	6.1	3.1	724.8	5.9	3.1
1982(p)	515.5	5.1	2.2	542.5	4.9	2.3
Noncellulosic man-made fibers**						
1978	8,357.1	67.6	37.5	8,528.6	64.7	38.3
1979	8,623.1	68.3	38.3	8,548.4	66.1	38.0
1980	8,027.1	67.3	35.3	7,803.3	64.7	34.3
1981	8,001.1	69.2	34.8	7,989.3	65.1	34.8
1982(p)	7,014.9	69.3	30.2	7,247.3	65.1	31.2

(p) preliminary

* Total includes flax and silk

** Includes manufactured waste

"Mill" consumption of cotton is the net weight of running bales. Wool data include apparel and carpet wool scoured basis. Rayon and acetate data and noncellulosic man-made fiber data (including glass) are producers shipments plus imports for consumption.

"Domestic" consumption refers to mill consumption adjusted for raw fiber equivalent of U.S. trade in textile manufactures. Rayon & acetate data and noncellulosic man-made fiber include fiber waste.

Source: U.S. Department of Agriculture,
Cotton & Wool Outlook & Situation
June 1983, CWS-35.

Summary of Mill Consumption By Fiber
(Billion pounds)

	1970	1975	1980	1982	Highest Year
Rayon	0.9	0.5	0.5	0.3	1973
Acetate	0.5	0.3	0.3	0.2	1970
Nylon	1.3	2.0	2.3	1.9	1979
Polyester	1.6	3.1	3.5	2.9	1979
Acrylic	0.5	0.5	0.6	0.5	1977
Olefin	0.2	0.5	0.7	0.8	1982
Glass	0.4	0.5	0.9	0.9	1981
Cotton	3.8	3.1	3.1	2.5	1971
Wool	0.3	0.1	0.1	0.1	1970
Total	9.5	10.6	12.0	10.1	1979

Source: America's Textiles (November 1983)

End-Use

Total Fiber Consumption by Category

	1981			
	Mils. of Pounds	% of Total	% Change 1981/1980	Av. % of Total 1979 - 1981
Total	11,950	100.0%	- 2.2%	100.0%
Apparel	4,603	38.5	- 4.6	38.3
Home furnishings	3,540	29.6	- 3.2	30.4
Industrial & consumer products	3,317	27.8	+ 6.3	26.7
Exports	490	4.1	- 20.6	4.6

(continued)

End-Use

Fiber Consumption in Broad Apparel Categories & Key Home Furnishings Categories

	1981		
	Mils. of Pounds	% of Total	% Change 1981/1980
Apparel categories:	4,381.5	95.2%	- 4.1%
Bottomweight fabrics	1,844.4	40.1	- 5.3
Topweight fabrics	986.0	21.4	- 2.3
Retail piecegoods	310.5	6.7	- 2.0
Men's underwear & nightwear	238.3	5.2	- 6.3
Women's underwear, nightwear, bras & foundations	212.0	4.6	- 2.7
Fabrics for lining	192.9	4.2	+ 6.8
Men's & women's anklets & socks	184.0	4.0	- 2.3
Men's & women's sweaters & related accessories	138.0	3.0	+ 0.5
Men's & women's robes & loungewear	126.9	2.8	- 14.3
High pile fabircs	78.6	1.7	- 21.7
Women's sheer hosiery	69.9	1.5	+ 3.1
Home furnishings categories:	3,392.5	95.8	- 5.1
Carpets & rugs	1,818.6	51.4	- 5.6
Sheeting & other bedding	533.4	15.1	+ 5.0
Drapery & upholstery	474.1	13.4	- 2.8
Towels & toweling	326.7	9.2	- 0.5
Bedspreads & quilts	140.9	4.0	+ 10.0
Blankets & blanketing	90.8	2.6	- 16.8
Curtains	81.0	2.3	- 9.5

(continued)

FIBER/PRODUCTION/CONSUMPTION

End-Use

Percent of All Fiber Consumed in 1981 by End-Use

	Cotton	% of Total	Wool	% of Total	Man-Made	% of Total
Total	24.6%	100.0%	1.6%	100.0%	73.8%	100.0%
Apparel	34.8	54.6	3.2	76.3	62.0	32.3
Home furnishings	21.9	26.4	0.8	14.9	77.3	31.0
Industrial & consumer type products	11.8	13.3	0.4	6.2	87.8	33.1
Exports	33.9	5.7	1.0	2.6	65.1	3.6

Source for preceding three tables:
Research Div., Merrill Lynch Pierce Fenner & Smith, Inc., based on Textile Organon (Textile Economics Bureau).

PRODUCTION OF TEXTILES

Textile industry leaders have been spending heavily in their effort to stay competitive. In the past five years they have put $6 billion into revamping or replacing ageing facilities. Because of this, textile industry productivity has been rising at a rate of 4% annually--from 6.6 lbs. of fiber processed per hour in 1973 to more than 8 lbs. in 1982.

The dramatic rebound in textile industry output which started in January 1983 continued in August and September according to indexes of production compiled by the Federal Reserve Board. Output of man-made fibers in August was up 26%, on a seasonally adjusted basis, compared with the same month in 1982. Output in the textile mill industry was ahead by 24% of the August 1982 level, with the index of 149.3 surpassing the previous record set in September 1979. In December 1982 the index reached a recession-period low of 122.2; the year as a whole was the worst since 1975.

However, some industry experts contend that the Government's index overstates the strength of the current recovery in the textile industry with not all segments properly represented. (The index is slated for a technical overhaul next year, according to the Fed. Coverage of apparel has been dropped due to a lack of representative data.)

PRODUCTION OF TEXTILES

Indexes of Production
(1967=100)

	August (Seasonally Adjusted) 1983	1982	% Change 1983/1982	Annual Average 1982	1981	% Change 1982/1981
All U.S. manufacturing	151.4	138.0	+ 9.7%	137.6	150.4	- 8.6%
Man-made fibers	249.5	198.2	+ 25.9	204.2	254.3	- 19.7
Textile mill products	149.3	120.6	+ 23.8	124.5	135.7	- 8.3
Fabrics (woven)	113.5	96.1	+ 18.1	90.9	102.7	- 11.5
Cotton	71.6	60.9	+ 17.6	60.2	66.1	- 8.9
Man-made	nr	nr	--	172.1	nr	--
Wool	nr	nr	--	47.7	nr	--
Knit goods	184.5	175.2	+ 5.3	172.3	186.6	- 7.7
Hosiery	216.4	215.0	- 0.6	212.5	229.0	- 7.2
Knit garments	168.4	155.1	+ 8.6	151.9	165.1	- 8.0
Fabric finishing	127.3	113.0	+ 12.6	117.7	141.8	- 17.0
Yarn & misc. textiles	145.7	122.4	+ 19.0	116.6	121.5	- 4.0
Carpeting	243.2	186.1	+ 30.7	182.0	186.2	- 2.3

nr= not reported.

Source: Board of Governors, Federal Reserve System (G.12.3)

The current inventory situation is favorable for the immediate future of the textile industry, according to industry analysts. From the end of 1979 to the middle of 1983 about two billion pounds were taken out of the "textile pipeline". As of June 1983, fiber shipments were running even with 1982, leaving room for the expansion of inventories in the future. (Daily News Record, June 1, 1983)

The Federal Reserve Board reported that capacity utilization in textile mills in August 1983 went up to 91.5%, gaining 1.5% over the July rate. This marked the first time in 42 months that textile mills used more than 90% of their capacity, and continued a string of eight consecutive monthly increases in textile mills' capacity utilization rates since the industry recorded its low mark of 75.5% in December 1982.

Based on mail survey within the industry, the U.S. Bureau of the Census compiles reports on major components of the textile/apparel industries which are published either monthly or quarterly, plus annual summary reports in the Current Industrial Reports Series. Highlights from these detailed reports are covered on the following pages.

PRODUCTION OF TEXTILES

Yarns

Production of Specified Yarns by Fiber & Method of Distribution, 1981, 1982
(Millions of pounds)

	1982	1981	% Change 1982/1981
Textured, crimped, or bulked filament yarns	1,748.7	2,126.8	- 17.8%
Fiber:			
Nylon	994.0	1,203.6	- 17.4
Polyester	594.2	771.9	- 23.0
Rayon, acetate, other	160.5	151.2	+ 6.1
Distribution:			
For sale	1,296.8	1,591.4	- 18.5
For own use	376.9	463.9	- 18.7
On commission	75.0	71.6	+ 4.8
Spun yarn	4,961.7	5,625.8	- 11.8
Fiber:			
Cotton or chiefly cotton	1,998.8	1,649.8	- 8.2
Wool or chiefly wool	114.9*	136.4*	- 15.9
Cellulosic or chiefly cell.	129.8	180.7	- 28.2
Noncellulosic	2,703.6	3,113.2	- 45.3
100% acrylic, modacrylic	249.7	284.8	- 12.3
100% polyester	291.6	361.0	- 19.2
Blends:			
Chiefly acrylic, modacrylic	94.7	100.7	- 6.0
Chiefly polyester with			
Cotton	1,323.5	1,530.6	- 13.5
Wool	24.9	25.0	- 0.4
Other fibers	**	**	--
100% nylon	485.8	514.5	- 5.6
Chiefly nylon	**	**	--
Other, 100% one fiber	38.4	52.4	- 25.2
Other blends	53.2	61.4	- 13.4
Other natural fibers	14.3	18.6	- 23.2
Distribution:			
For sale	1,516.5	1,650.1	- 8.1
For own use	3,404.1	3,918.4	- 13.1
On commission	41.1	57.2	- 28.1

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22F

Broad Woven Fabrics (Gray Goods)

The CIR reports on gray goods over 12 inches in width indicate a pickup in the second quarter of 1983 compared with year-ago figures and also with the previous quarter except for cotton broad woven goods where output was about even in the first two 1983 quarters (although ahead of last year).

PRODUCTION OF TEXTILES

Broad Woven Fabrics (Gray Goods)

A decline in the demand for U.S. jeans and competition from imported fabrics hurt the denim market. In 1982, production dropped to 590.3 million square yards as the downward trend from the peak of 748.9 million yards produced in 1977 continued. Denim accounts for an estimated 81% of jeans sold in the U.S. A revival in demand is noted this year, and denim output in the second quarter of 1983 gained 48% over the total in the same 1982 period.

However, cotton fabric production held up better in 1982 compared with 1981 than other fabrics, dropping only 3%. Man-made fiber fabrics dropped 22%; woolens and worsteds were off 27%.

Summary of Production of Broad Woven Fabrics, Felts & Tire Cord, 1981, 1982 & 2nd Quarter, 1982, 1983
(Gray Goods: Millions of Square Yards)

	Second Quarter		Annual Total	
	1983	1982	1982	1981
Broad woven fabrics, total	3,540.9	3,281.0	12,485.8	15,103.1
Cotton or chiefly cotton fabrics	1,046.5	939.9	3,779.2	3,912.9
Duck & allied fabrics	24.3	24.2	93.6	95.1
Sheeting & allied fabrics	140.2	130.8	510.5	678.1
Print cloth yarn fabrics	407.4	404.2	1,573.8	1,432.3
Carded colored yarn fabrics*	(D)	136.9	(D)	(D)
Denims, clothing, incl. sport denims	177.3	119.6	525.2	590.3
10 oz. & under per sq. yd.	25.2	19.7	68.9	70.5
Over 10 oz. per sq. yd.	152.1	99.9	456.3	519.8
Towels, toweling & dishcloths	119.9	113.3	434.1	489.8
Napped fabrics, blankets & blanketing	21.8	17.9	74.4	87.4
Fine cotton fabrics	(D)	44.4	(D)	120.8
Other woven fabrics & specialties	85.5	92.3	322.6	(D)
Corduroys	60.8	67.7	242.6	276.7
Man-made or chiefly man-made fabrics	2,454.2	2,281.0	8,585.5	11,025.2
100% filament yarn fabrics:				
Chiefly rayon and/or acetate	60.8	105.8	(D)	(D)
Chiefly nylon fabrics	90.9	105.5	320.9	432.5
All other filament yarn fabrics	736.4	618.6	(D)	(D)
100% spun yarn fabrics:				
Rayon & acetate	28.2	28.6	101.4	592.4
Polyester blends with cotton	956.5	905.0	3,565.4	4,320.8
All other spun yarn fabrics	283.5	261.0	1,031.9	1,307.6
Combinations & mixtures of filament & spun yarn fabrics	256.4	221.8	797.8	137.9
Silk, paper & other specialty fabrics	(S)	34.6	137.9	146.9

(continued)

PRODUCTION OF TEXTILES

Broad Woven Fabrics (Gray Goods)

Summary of Production of Broad Woven Fabrics, Felts & Tire Cord, 1981, 1982 & 2nd Quarter, 1982, 1983
(Gray Goods: Millions of Square Yards)
(continued)

	Second Quarter		Annual Total	
	1983	1982	1982	1981
Woolen & worsted fabrics (not incl. felt)	40.2	36.1	121.1	165.0
Men's & boys' clothing	16.0	16.2	55.0	76.3
Women's & children's clothing	22.0	18.3	60.5	84.0
Nonapparel fabrics	(S)	(S)	5.7	4.7
Woven felts (millions of pounds)	(S)	(S)	9.7	13.9
Tire cord & fabrics (millions of pounds)	119.2	111.6	466.7	568.8
Rayon	3.8	(D)	(D)	13.8
Nylon & polyester	93.6	88.4	362.7	479.0
Chafer & all other*	21.7	(D)	(D)	76.0

* Includes cotton, steel, glass, and all other man-made fiber cord and tire cord fabrics.
(D) Withheld to avoid disclosing figures on individual companies.
(S) Does not meet publication standards.

Source: U.S. Bureau of the Census,
Current Industrial Reports
Broadwoven Fabrics (Gray) MQ22T.

Finished Broad Woven Fabrics

The Nation's finishing plants and textile mills bleached, dyed or printed 6,600 million linear yards of broad woven goods in 1982, 11.7% below comparable figures for 1981. Finished cotton goods was down 8.9%; man-made fiber goods, down 13.3%. The backlog of finishing orders was 487 million linear yards in 1982 compared with 520 million linear yards in 1981, a drop of 6.3%.

Cotton & Man-Made Fiber Broad Woven Goods Finished
1980-1982 & Jan.-July 1983/82 % Change
By Type of Finish
(Millions of Finished Linear Yards)

	1982	1981(r)	1980	% Change** Jan.-July 1983/82
Cotton & man-made fiber broad woven fabrics finished*				
Cotton, total	2,466.0	2,707.2	2,896.0	na
Whites & plain colors	2,070.7	2,248.6	2,507.9	na
Whites	1,204.3	1,287.1	na	+ 11.0%
Plain colors	882.0	961.4	na	+ 14.2
Prints	379.7	458.6	388.0	+ 42.8

(continued)

PRODUCTION OF TEXTILES

Finished Broad Woven Fabrics

Cotton & Man-made Fiber Broad Woven Goods Finished
1980-1982 & Jan.-July 1983/82 % Change
By Type of Finish
(Millions of Finished Linear Yards)
(continued)

	1982	1981(r)	1980	% Change ** Jan-July 1983/82
Man-made, total*	4,194.1	4,834.6	4,843.5	+ 19.4%
Whites & plain colors	3,274.0	3,749.6	3,688.0	na
Prints	920.1	1,084.9	1,155.5	na

na - not available (r) = revised

* Excludes finished fabrics not bleached, dyed or printed at the reporting establishment (flameproofed, sanforized, mildewproofed, mercerized, embossed, etc.) which were reported at 23 million linear yards of cotton fabric for 1982, 36 million in 1981 and 167 million linear yards of man-made fabrics for 1982 and 170 million yards for 1981.

**Seasonally adjusted rate as reported by the ATMI.

Source: U. S. Bureau of the Census,
Current Industrial Reports, MA-22S

Production & Exports of Finished Broad Woven Fabrics, 1981, 1982
(Millions of finished linear yards)

	Domestic Production	Exports of Domestic Mdse.	% Exports To Total Fabrics
1982			
Total finished fabrics	6,660.1	306.6	4.6%
Cotton broad woven fabric	2,466.0	100.5	4.1
Man-made fiber broad woven fabrics	4,194.1	206.1	4.9
1981			
Total finished fabrics	7,541.8	533.1	7.1
Cotton broad woven fabrics	2,707.2	132.0	4.9
Man-made fiber broad woven fabrics	4,834.6	401.1	8.3

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA-22S

Narrow Fabrics

Data on narrow fabrics is reported in terms of shipments--quantity and value--by producers rather than in terms of production.

Summary Of
Quantity & Value of Shipments (Including Interplant Transfers)
Of Woven & Braided Narrow Fabrics: 1981, 1982
(Not Over 12 Inches in Width, Made of Cotton, Wool, Silk, Man-mades)

	Unit of Measure (Mils.)	1982 Quantity	1982 Value (Thous.$)	1981 Quantity	1981 Value (Thous.$)
Narrow fabrics, total	(X)	--	$737,754	--	$763,811
Woven narrow fabrics	(X)	--	555,457	--	558,192
Elastic	Linear yards	1,371.4	190,672	1,561.6	192,662
Corset & allied lines (inches)	Linear yards	361.4	56,027	413.2	56,411
3/4 & under	Linear yards	293.9	43,053	342.9	42,764
Over 3/4 to 1½	Linear yards	56.6	7,287	58.7	7,875
1½ to 3	Linear yards	10.0	4,493	11.0	4,819
Over 3	Linear yards	0.9	1,194	0.6	953
Underwear	Linear yards	371.5	43,747	304.5	34,125
Other apparel	Linear yards	266.9	34,270	421.0	46,395
Other uses	Linear yards	371.7	56,628	422.9	55,761
Nonelastic	(X)	--	364,785	--	365,530
Ribbons, woven edge	Linear yards	729.2	66,116	624.3	54,528
Labels	Number	3,648.5	66,351	3,981.0	61,274
Tapes	Linear yards	2,374.5	89,334	2,564.2	96,578
Zipper tape	Linear yards	232.1	12,106	374.0	16,340
Apparel tape	Linear yards	766.7	31,277	786.9	32,757
Household article tapes	Linear yards	288.7	10,347	355.9	12,326
All other tape	Linear yards	1,088.0	35,604	1,047.4	35,155
Webbing	Linear yards	587.7	81,366	589.0	88,096
All other	(X)	--	61,618	--	65,054
Braided narrow fabrics	(X)	--	143,060	--	164,996
Elastic braids	Linear yards	945.4	36,029	956.7	40,777
Nonelastic braids	(X)	--	107,031	--	124,219
Shoe & corset laces	Pounds	9.3	41,050	9.7	41,342
Other nonelastic braids	(X)	--	65,981	--	82,877
Narrow fabrics, type not specified	(X)	--	39,237	--	40,623

(X) = not applicable

Note: The above represents the quantity and value of products made from own materials and excludes production made from materials owned by others.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22G.

PRODUCTION OF TEXTILES

Knit Fabrics

Conditions in the domestic knit fabrics industry have lost the rosy hue that predominated when knits were at the peak of their popularity in the 1960's. Changing consumer tastes, competition from imports and changes in the timing of large retail buyers are noted by industry spokesmen among their current problems.

The latest information currently available in the Census Bureau's CIR series covers knit fabric production in the year 1981. However, Federal Reserve Board production indexes are available currently on knit goods which includes fabrics as well as knitwear made in knitting mills.

On a seasonally adjusted basis, the index for August 1983 was up 5.3% over the index in August 1982, although it registered an 8% drop compared with the July 1983 index. Results this year are expected to be much better than in 1982 due to improvements in the economy and the strength of the demand for active wear in which knits are an important component.

Knitters have been aggressively developing new fashion fabrications to appeal to the young, active market.

Summary of Knit Fabric Production
(Millions of Pounds)

	1981	1980	1979
Knit fabric production	1,420	1,597	1,754
Warp knit fabric	360	407	473
Tricot, simplex & milanese	295	343	408
Raschel & raschel-crochet	65	64	66
Weft knit fabric	1,060	1,190	1,281
Single circular knit	654	688	710
Double knit & interlock	298	381	458
Rib knit	108	121	113

Production of Knit Fabrics by End-Use, 1980, 1981
(Millions of Pounds)

	1981	1980
Warp knit yardgoods	360.1	407.0
Tricot, simplex & milanese	295.1	343.2
Underwear, nightwear, loungewear, lingerie, foundations	143.5	192.9
Outerwear fabric	71.2	73.6
All other tricot fabrics	64.7	61.2
End-use not specified	15.7	15.6
Raschel & raschel-crochet	65.0	63.8

(continued)

PRODUCTION OF TEXTILES & APPAREL

Knit Fabrics

Production of Knit Fabrics by End-Use, 1980, 1981
(Millions of Pounds)
(continued)

	1981	1980
Weft knit yardgoods	1,060.4	1,189.9
Single circular knit	654.1	688.0
Excluding high pile, terry cloth, etc.	428.3	463.6
Underwear & nightwear	176.3	196.4
Shirts, tops, blouses, dresses	172.7	178.5
All other uses	53.6	72.3
High pile (silver knit & spring needle)	143.5	130.1
Velour & terry cloth	48.3	71.3
End-use not specified	34.0	23.0
Double knit & interlock	298.4	380.8
Outerwear apparel other than shirts	187.6	254.0
Shirts, blouses & tops	79.3	90.3
All other uses	14.0	19.7
End-use not specified	17.5	16.8
Rib, other than double knit & interlock	107.9	121.1

Distribution of Knit Fabrics Off Knitting Machines, 1980, 1981

	1981	1980
Total	100.0%	100.0%
Produced for sale	56.5	56.0
Produced for own use	33.7	33.3
Produced on commission	9.8	10.7

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA-22K.

Nonwoven Fabrics

One of the bright spots in the textile/apparel industrial complex over the past several years has been the nonwoven fabric area. Frost & Sullivan, a Cleveland based market research company, reports that between 1978 and 1981 sales of nonwovens rose from $1.05 billion to $1.08 billion, but estimates that by 1986 sales could more than double, reaching $2.24 billion (Daily News Record, November 16, 1982).

As opposed to most other areas of the textile/apparel industry, analysts see a bright future for nonwovens. Most analysts agree that presently, the over-capacity status coupled with reduced inventories of most nonwoven markets will help to unleash a substantial increase in production to replenish these inventories.

PRODUCTION OF TEXTILES & APPAREL

Nonwoven Fabrics

Major growth in nonwovens is expected to be the medical-surgical, geotextile and industrial specialty areas. Areas expected to be of declining importance are interlinings and automotive applications due to the severe impact the 1981-82 recession has had on these areas. The disposable diaper and sanitary napkin markets are now labeled as mature by most industry analysts; however, in terms of sheer volume, these uses are and will continue to be the largest markets for disposable nonwovens. It is currently estimated that disposable nonwovens account for slightly more than half of domestic nonwoven consumption, versus durable nonwovens.

In terms of volume, the market for nonwoven fabrics is expected to increase from the 3.88 billion square yards recorded in 1981 to 5.69 billion in 1986, an increase of 46.6% for the period. The industry consumed 769 pounds of fibers and polymers in 1981 valued at $392 million, and is expected to increase this consumption to 1.15 billion pounds, worth $743 million in 1986.

VALUE OF PRODUCT SHIPMENTS

A preliminary estimate on the value of specified products of the textile/apparel complex for the year 1982 (which are subject to revision), as well as the relationship to shipments of the value of exports and of imports, have been reported by the U.S. Bureau of Industrial Economics in the 1983 U.S. Industrial Outlook.

Estimated Value of Shipments, Imports, Exports, 1982

	Cellulosic Fibers	Non-Cellulosic Fibers	Yarns (incl. wool)	Broad Woven Fabrics	Knit Fabrics	Apparel*
Value (mil. $)						
Product shipments	$ 913	$ 7,160	$ 4,135	$ 13,725	$ 4,783	$38,000
Exports	67	1,302	87	685	51	778
Imports	24	90	137	1,344	20	7,536
Exports as a % of shipments	7.3	18.2	2.1	5.0	1.1	2.0
Imports as a % of apparent consumption (value)**	2.8	1.5	3.3	9.3	0.4	16.6

* Estimated data for apparel, alone, not including other textile products.
**Apparent consumption is the sum of product shipments plus imports less exports.

In terms of a constant (1972) dollar value, the compound annual rate of growth within the textile/apparel industry of product shipments has been reported by the Bureau of Industrial Economics as follows for 1972-1982:

(continued)

VALUE OF PRODUCT SHIPMENTS

	Compound Annual Rate of Growth (Loss) 1972-1982
Cellulosic fibers	- 4.2%
Non-cellulosic fibers	+ 4.4
Textile mill products	- 1.1
Yarns, except wool	- 2.0
Wool yarns	- 1.9
Cotton broad woven fabrics	- 3.6
Man-made fiber fabrics	+ 1.8
Wool fabrics	- 0.7
Knit fabrics	-0-
Apparel & other textile products	- 0.8

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook.

In years between the complete census of manufactures conducted every five years by the U.S. Bureau of the Census, the Bureau compiles annual surveys of manufactures. Data from the most recent report covering 1981 shipments, compared with 1980, are reported in the following table.

Value of Shipments by Product Classes, 1980, 1981
(Including Shipments by All Producers)
(Millions of Dollars)

	1981	1980	% Change 1981/1980
Textile & Apparel Products			
Fibers			
Rayon & acetate fiber	$1,230.9	$1,155.9	+ 6.5%
Noncellulosic organic fibers	8,139.2	7,146.7	+ 13.9
Nylon fibers, exc. producer textured	2,788.2	2,494.4	+ 11.8
Acrylic & modacrylic fibers, exc. textured	648.8	627.3	+ 3.4
Polyester fibers, exc. producer textured	3,231.9	2,715.8	+ 19.0
Other noncellulosic man-made fibers, exc. textured	517.3	416.6	+ 24.2
Producer textured man-made fibers, group filament	944.3	885.2	+ 6.7
Organic fibers, noncellulosic, not specified by kind	8.7	7.4	+ 17.6
Glass fibers (textile)	798.9	681.0	+ 17.3
Textile mill products			
Cotton broad woven fabrics*	4,778.4	4,876.2	- 2.0
Man-made fiber & silk broad woven fabrics*	8,533.2	7,554.7	+ 13.0
Woven wool fabrics	885.5	730.7	+ 21.2
Narrow fabrics	955.5	859.3	+ 11.2
Fabric finishing (other than in weaving mill)			
Cotton broad woven fabrics	1,207.6	1,233.0	- 2.1
Man-made fiber & silk broad woven fabrics	2,560.2	2,111.3	+ 21.3
Finished yarn, raw stock & narrow fabrics except knit & wool (not spun, thrown, woven or braided in the same establishment)	752.7	721.7	+ 4.3

(continued)

Value of Shipments by Product Classes, 1980, 1981
(Including Shipments by All Producers)
(Millions of Dollars)
(continued)

	1981	1980	% Change 1981/1980
Knitting mill products			
Women's hosiery, except socks	$1,132.5	$1,105.9	+ 2.4%
Hosiery, not elsewhere classified	1,300.0	1,189.5	+ 9.3
Knit outerwear	2,600.2	2,442.8	+ 6.4
Knit underwear & nightwear	700.3	731.1	- 4.2
Circular knit fabric	2,979.0	3,137.2	- 5.0
Warp knit fabric	1,706.9	1,739.1	- 1.9
Knit gloves & knit products, not elsewhere classified (made from yarns or fabrics knit in the same establishment)	113.0	142.0	- 20.4
Woven carpets & rugs	211.8	202.4	+ 4.6
Tufted carpets & rugs	5,409.0	5,277.6	+ 2.5
Carpets & rugs, type not specified	140.9	126.9	+ 11.0
Yarn, except wool	4,894.0	4,592.8	+ 6.6
Textured, thrown & rewound yarn	2,020.3	1,818.5	+ 11.1
Wool yarn	358.4	303.9	+ 17.9
Thread	743.7	666.7	+ 11.5
Pressed, punched or needled felts, except hats	245.3	224.0	+ 9.5
Lace & net goods	68.6	54.7	+ 25.4
Paddings & upholstery filling	270.3	256.6	+ 5.3
Processed textile waste	234.1	212.4	+ 10.2
Coated fabrics, not rubberized	1,153.3	1,019.3	+ 13.2
Tire cord & tire fabrics	903.1	866.1	+ 4.3
Non-woven fabrics & products	1,761.3	1,529.6	+ 15.1
Cordage & twine	378.4	339.7	+ 11.4
Other textile goods	323.2	299.9	+ 7.8
Rubber coated fabrics & rubber clothing	280.2	226.4	+ 23.8
Apparel, total (not incl. products made in knitting mills)	36,123.8	33,145.5	+ 9.0
Men's & boys' wear (specified types)	14,691.2	13,953.9	+ 5.3
Suits, coats, other tailored clothing	2,842.8	2,701.4	+ 5.2
Shirts (except work) & nightwear	3,457.6	3,340.1	+ 3.5
Underwear (made from purchased fabrics)	363.8	397.7	- 8.5
Neckwear	299.6	280.0	+ 7.0
Separate trousers	1,990.5	1,838.2	+ 8.3
Work clothing, work shirts, etc.	4,345.9	4,086.8	+ 6.3
Other men's & boys' wear (heavy outerwear, non-tailored jackets, etc.	1,391.0	1,309.7	+ 6.2
Women's & children's wear (specified types)	21,432.6	19,191.6	+ 11.7
Blouses, shirts, women's & misses'	3,652.2	3,331.2	+ 9.6
Dresses, women's & misses'	4,357.5	4,277.9	+ 1.9
Suits & coats, women's & misses'	3,513.6	2,988.3	+ 17.6

(continued)

VALUE OF PRODUCT SHIPMENTS

Value of Shipments by Product Classes, 1980, 1981
(Including Shipments by All Producers)
(Millions of Dollars)
(continued)

	1981	1980	% Change 1981/1980
Apparel (continued)			
Other outerwear, women's & misses'	$4,515.1	$3,781.1	+ 21.4%
Underwear & nightwear (made from purchased fabrics)	2,294.7	2,141.7	+ 7.1
Brassieres & allied garments	683.7	605.0	+ 13.0
Children's dresses & blouses	1,227.8	1,038.1	+ 18.3
Children's coats & suits	206.0	213.5	- 3.5
Children's outerwear, not elsewhere classified	981.7	877.8	+ 11.8
Men's, women's, children's wear			
Hats & caps, except millinery	555.0	543.3	+ 2.2
Fur goods	497.4	539.8	- 7.9
Gloves, fabric, dress & work	278.2	284.1	- 2.1
Robes & loungewear, except children's	374.3	357.3	+ 4.8
Raincoats & other waterproof outergarments	453.7	447.4	+ 1.4
Leather & sheep-lined clothing	248.2	246.6	+ 0.6
Apparel belts	446.4	358.4	+ 24.6
Apparel & accessories, not elsewhere classified	306.4	265.0	+ 15.6
Other textile products (exc. products made in knitting or weaving mills)	9,517.9	8,585.2	+ 10.9
Household textiles			
Curtains & draperies, except lace	1,033.6	1,014.6	+ 1.9
Linens & domestics (sheets, towels, etc.)	3,031.6	2,816.3	+ 7.6
Textile bags, except laundry, wardrobe & shoe	371.3	301.7	+ 23.1
Canvas & related products	713.6	562.1	+ 27.0
Pleating & stitching, embroidery (except schiffli)	689.3	650.0	+ 6.0
Trimmings, automotive & apparel	2,254.4	1,943.9	+ 16.0
Schiffli machine embroideries	244.0	209.6	+ 16.4
Other fabricated textile products	1,180.1	1,087.0	+ 8.6

(r) = revised
nr = not reported
n.e.c. = not elsewhere classified
* Includes fabricated textile products, such as sheets and towels, made in weaving mills, as well as gray goods and finished broad woven fabrics.

Source: U.S. Bureau of the Census, 1980, 1981 Annual Survey of Manufactures.

VALUE OF PRODUCT SHIPMENTS

Based on a survey of manufacturers in the industry, the U.S. Bureau of the Census has issued data on the value of shipments of apparel items for the year 1982 compared with 1981 in the Current Industrial Reports series (1981 totals may differ from those issued in the Annual Survey of Manufactures and are subject to revision).

Value of Shipments of Major Categories of Apparel, 1981, 1982
(Millions of Dollars)

	1982	1981	% Change 1982/1981
Total apparel, not including accessories, hosiery, furs or products made in knitting mills	$32,311.5	na	--
Men's wear, total	11,762.6	na	--
Tailored clothing & casual wear	2,264.0	$ 2,326.4	- 4.2%
Shirts, tops, sweaters	2,794.1	2,851.4	- 2.0
Trousers, slacks, jeans, shorts	3,314.2	3,357.8	- 1.3
Outerwear jackets	619.3	513.9	+ 20.5
Work wear	914.0	939.3	- 2.7
Athletic wear, incl. boys'	875.2	na	--
Nightwear, underwear	999.7	956.5	+ 4.5
Boys' wear	1,736.3	1,844.2	- 5.9
Tailored clothing & casual wear	135.0	135.5	- 0.4
Shirts, tops, sweaters	593.2	624.6	- 5.0
Trousers, slacks, jeans, shorts	754.1	805.8	- 6.4
Outerwear jackets	92.0	107.7	- 14.6
Work wear	29.4	34.8	- 15.5
Nightwear, underwear	132.6	135.8	- 2.4
Women's, misses' & junior wear	16,056.5	na	--
Dresses, coats, suits, sportswear, etc.	12,530.0	11,932.8	+ 5.0
Active sportswear, playwear	706.4	na	--
Innerwear, nightwear, foundations	2,583.7	2,480.7	+ 4.2
Washable service apparel	236.4	220.5	+ 7.2
Girls', children's, infants' wear	2,756.1	2,667.0	+ 3.3
Dresses, coats, suits, skirts, blouses, sweaters	1,814.4	1,747.7	+ 3.8
Playwear, swimwear	484.5	456.2	+ 6.2
Underwear, nightwear	457.2	463.1	- 1.3

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel, MA-23A.

PRODUCER PRICE LEVELS

Producer (factory) price increases for textile products and apparel averaged slightly less than those for all industrial commodities in 1982 according to data released by the U.S. Bureau of Labor Statistics. Overall textile products and apparel prices at the factory were 2.5% higher in 1982 than in 1981 while the price increase for all industrial commodities during this same period was 2.7%.

In June of 1983, the price of textile products and apparel had declined, overall by 0.2% while the price of all industrial products registered an increase of 1.2% compared with June of 1982.

There are several possible reasons for the producer prices of textiles and apparel to rise at a slower rate than that of all industrial commodities including the competitive nature of the industry and competition from foreign supply sources. Because the impact of inflation on textiles and apparel has been less severe than on other commodities, it is expected that the deflationary pressures that are expected in the short term will also be less severe.

Producer Price Index, 1981, 1982 & June 1982, 1983
(1967 = 100, unless otherwise noted)

	June Average			Annual Average		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Industrial commodities	314.4	310.6	+ 1.2%	312.3	304.1	+ 2.7%
Textile products & apparel	204.5	205.0	- 0.2	204.6	199.7	+ 2.5
Selected textile mill products*	137.2	138.2	- 0.7	138.2	135.9	+ 1.7
Synthetic fibers*	156.6	162.8	- 3.8	162.1	156.3	+ 3.7
Processed yarns & threads*	137.6	139.4	- 1.3	138.3	138.0	+ 0.2
Gray goods*	145.8	146.0	- 0.1	145.3	146.8	- 1.0
Finished fabrics*	122.5	124.0	- 1.2	124.6	125.2	- 0.5
Apparel products	196.6	195.0	- 0.8	194.4	186.1	+ 4.5
Women's wear	175.0	173.5	+ 0.9	173.1	164.5	+ 5.2
Men's wear	222.7	220.5	- 1.0	219.5	210.9	+ 4.1
Infants' & children's wear	197.5	195.3	+ 1.1	196.6	190.8	+ 3.0
Textile housefurnishings	239.5	239.7	+ 0.1	238.5	226.7	+ 5.2
Bedclothes*	134.1	138.5	- 3.2	137.0	129.8	+ 5.5
Bath products*	143.9	142.5	+ 1.0	144.2	143.1	+ 0.8
Window & furniture accessories*	136.7	129.6	+ 5.5	128.9	119.3	+ 8.0
Final textile products, n.e.c.*	134.5	134.4	+ 0.1	134.9	131.7	+ 2.4
Carpets & rugs	157.5	160.2	- 1.7	159.1	157.2	+ 1.2

* = 12/75 = 100

n.e.c. = not elsewhere classified

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The 20-year old coalition of U.S. fiber, textile and apparel producers is becoming strained by the rising tide of imports and divergent competitive pressures. With the release of September 1983 data on textile and apparel imports, the nation appeared to be headed for a staggering $9.5 billion deficit in textile and apparel trade this year--31% higher than last year's record total, according to the American Textile Manufacturers Institute.

This is based on annualized rates of import/export growth registered in the first nine months of 1983. The total value of textile/apparel imports in the period rose 13% over the same 1982 period; in quantity (square yard equivalents), the nine-month total gained 20.8%.

Contrary to the pattern in past years, in recent months the textile mill segment has been particularly hard hit by imports. In the first nine months of 1983 the quantity of textile mill products imported into the U.S. climbed 31.6% over the same 1982 period. Apparel imports were up at a smaller rate--13%. The American Apparel Manufacturers Association reports that on an annualized basis overall apparel imports are running at a rate of 3.93 billion square yards--550 million SYE more than in 1982. The Association anticipates that 1983 volume of imports will exceed any expansion for 1983 in the domestic market.

Exports of textile/apparel, on the other hand, declined 17% in value in the January-September period compared with the same months of 1982. Despite the efforts of the textile industry to become more competitive in foreign markets, exports have been hurt by a strong dollar as well as by excessive duty rates, strict overseas licensing laws and other non-tarrif barriers, such as subsidies by foreign governments.

The current jump in imports of textiles/apparel is attributed by U.S. Department of Commerce officials to a shaft in buying, with a heavier concentration in uncontrolled items, in textile mill products and in purchases from nations--notably the European Economic Community--where no bilateral agreement exist to curb the flow. The demand by the U.S. producers for a stronger import program and a revamping of controls that are ineffective is becoming stronger. Through loopholes in the trade treaties between the U.S. and the major apparel and textile exports--Taiwan, Korea, Hong Kong, Japan and China--imports are increasing despite the quotas.

Domestic apparel manufacturers have a hard time competing with imports, primarily because they have to pay their workers an average of $4.96 per hour; in Taiwan, the largest apparel exporter to the U.S., hourly wages are $1.32.

In order to compete and lower costs, many larger apparel firms have established off-shore processing or assembly facilities (particularly in the Caribbean basin) under duty provision Item 807. This allows U.S. firms to ship components to foreign operations that assemble the final product and ship it back to the U.S., with duty levied only on the value added abroad, rather than on the total value. In 1983 some major U.S. mills, including Dan River and West Point Pepperell decided to launch offshore apparel production under Item 807 with the announced intention of confining 807 merchandise to American apparel manufacturers, not to retailers. Textile mills have also sought acceptance of Item 809 which would result in lower duties on foreign apparel shipped to the U.S. which is made with U.S. textiles. Thus far this plan has been blocked.

FOREIGN TRADE

In another move, many U.S. apparel manufacturers are transferring their operations overseas, manufacturing garments abroad. This may be responsible for as much as 30% of the current import deluge, according to trade sources. A recent analysis indicated that 32% of all garments sold in the U.S. in 1982 were imported, and this figure will undoubtedly be larger by the end of 1983. (Daily News Record, September 8, 1983).

Apparel firms' problems have been enhanced by the increasing tendency of large American retailers to purchase directly from foreign suppliers. Imports provide retailers with higher margins than domestic apparel and can more easily be offered at sale prices--a major factor in current retail strategy. Retailers are, therefore, generally opposed to a strengthening of import controls.

Import penetration in the U.S. textile/apparel industries varies widely by product. Since cheap labor is the major cost advantage of foreign suppliers, and lead times of six months or more their principal disadvantage from a competitive standpoint, imports have tended to make their greatest penetration in the apparel lines that involve considerable labor but that are less fashion-sensitive. A study a couple of years ago estimated overall import penetration at 12%. It is certainly higher now, and, as noted, imports represented 32% of apparel sold in the U.S. Penetration by product category varies considerably within the complex. Very little carpeting, tire cord, or domestic products (sheets and towels) are imported.

Summary of Value of U.S. Imports & Exports of Textiles
(Excluding Fibers & Clothing, Including Yarn & Fabrics)
(Millions of Dollars)

Year	General Imports (Customs Value Basis*)	Exports (f.a.s. Basis)**	Exports Minus Imports
1975	$ 1,223.5	$ 1,624.5	$ 401.0
1978	2,231.9	2,225.4	- 6.5
1979	2,237.7	3,189.4	951.7
1980	2,504.1	3,632.0	1,127.9
1981	3,045.9	3,618.9	573.0
1982	2,807.5	2,784.1	-23.8

Summary of U.S. Imports & Exports of Apparel

1975	$ 2,550.8	$ 401.6	$-2,148.2
1978	5,617.9	677.0***	-4,940.9
1979	5,812.9	931.2	-4,881.7
1980	6,376.3	1,202.5	-5,173.8
1981	7,536.8	1,232.1	-6,304.7
1982	8,164.6	952.3	-7,212.3

(footnotes continued)

(Footnotes continued)

*The "customs value" generally represents the value in the foreign country and excludes freight, insurance and U.S. import duties.
**The f.a.s. value represents the transaction value of the port of export. It includes all charges incurred in placing the goods alongside the ship (carrier).
***About 45% of U.S. apparel exports in 1978 were reimported under Item 807 of the U.S. Tariff Schedule. This allows domestic manufacturers to send components "offshore" to be assembled by low-wage workers, then to have the product returned and duty paid only on the value added abroad. This is a growing development.

Source: U.S. Department of Commerce, Highlights of U.S. Export & Import Trade, (December issues).

A strong dollar and world-wide depressed markets caused a decline in exports of noncellulosic fibers in 1982 for the first time since 1975.

	Value (Millions of Dollars)	
	Imports	Exports
Cellulosic man-made fibers		
1980	$23.3	$81.6
1981	28.5	72.5
1982(p)	24.0	66.6
Organic fibers, noncellulosic		
1980	69.5	1,236.5
1981	99.0	1,518.0
1982(p)	90.3	1,302.0

(p) preliminary

Source: U.S. Department of Commerce, Bureau of Industrial Economics, 1983 U.S. Industrial Outlook.

Imports

Quantity of U.S. Cotton, Wool & Man-made Fiber/Textile/Apparel Imports
(Millions of Pounds)

Product Group	Fiber	1982	1981	1980	% Change 1982/1981
Total imports		1,665.6	1,690.3	1,433.9	- 1.5%
	Cotton	896.8	961.9	810.9	- 6.8
	Wool	100.7	93.1	85.1	+ 8.2
	Man-made	695.1	635.3	537.9	+ 9.4

(continued)

FOREIGN TRADE

Imports

Quantity of U.S. Cotton, Wool & Man-made Fiber/Textile/Apparel Imports
(Millions of Pounds)
(continued)

Product Group	Fiber	1982	1981	1980	% Change 1982/1981
Yarn & thread, total		71.7	60.2	50.8	+ 19.1
	Cotton	28.5	24.1	19.2	+ 18.3
	Wool	7.8	5.0	4.2	+ 56.0
	Man-made	35.4	31.1	27.4	+ 13.8
Fabric, total		388.7	475.9	352.9	- 18.3
	Cotton	266.4	350.3	258.4	- 24.0
	Wool	25.7	27.8	21.2	- 7.6
	Man-made	96.6	97.8	73.3	- 1.2
Apparel, total		1,043.1	987.0	884.2	+ 5.7
	Cotton	510.2	504.0	463.8	+ 1.2
	Wool	46.4	45.9	41.7	+ 1.1
	Man-made	468.5	437.1	378.7	+ 7.2
Made-up & miscellaneous, total		182.1	179.6	145.9	+ 1.4
	Cotton	91.7	83.6	69.3	+ 9.7
	Wool	20.8	19.4	18.1	+ 7.2
	Man-made	69.6	76.6	58.5	- 9.1

Source: American Textile Manufacturers Institute, Inc., based on U.S. Department of Commerce reports.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Plant & Equipment

According to the Bureau of Economic Analysis, U.S. Department of Commerce, in 1982 textile mills spent $1.33 billion for new plant and equipment--representing a decline of 14.6% from the $1.56 billion spent in 1981. Expressed in 1972 dollars to adjust for inflation, the 1982 spending total was the lowest in almost 20 years.

A quarterly survey of the textile industry is conducted by the Bureau to develop information on current spending for new plant and equipment and plans. According to the most recent survey taken in July and August 1983, textile corporations said they plan to increase spending and if plans hold up, the year 1982 would mark the first increase reported by the Bureau since 1980. In that year the textile industry's spending rose to $1.62 billion, gaining 8% over 1979. Inflation eroded most of the gain, but that will not be the case this year as the Commerce Department estimates capital goods' prices will decline 0.8% in 1983.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Plant & Equipment

With improved economic conditions, as retained cash flow rises, textile mills will implement delayed improvements. Normally, 80% of the industry's retained cash flow is invested; however, because of the stiff competition from foreign producers, industry analysts believe a higher level of investment will be needed if the industry is to remain competitive.

Federal regulatory standards on dust control and on allowable noise levels in the textile mills are still of concern to mills and machinery manufacturers, as the cost of installing and maintaining more pollution control equipment is seen as a dampener on purchases of other mill machinery and equipment. The high cost of borrowing is another factor in holding down improvements, particularly among the smaller producers.

The apparel industry is also expected to make significant increases in capital expenditures to upgrade equipment in 1983. There is still much overcapacity due to cutbacks in apparel demand, but some equipment is lying idle because it is antiquated.

Apparel manufacturers are now increasingly looking to computerized equipments both for material handling and management control. Such improvements are looked to in order to reduce the cycle time from cutting to finished products, and thus reduce costs. Knit goods manufacturers are installing electronic knitting machines to an increasing extent.

Due to a difference in compiling data and to industry definitions, information on spending for new plant and equipment by the Bureau of Economic Analysis and by the Bureau of the Census differ. The former, however, develops the current trends, while the most recent information from the Census Bureau is from the Annual Survey of Manufactures, 1981. Details from the Annual Survey follow:

Textile Mill & Apparel Industry Expenditures, Retirements, Depreciation, 1981
(Millions of Dollars)

	Textile Mill Products			Apparel & Other Textile Products		
	Total	Buildings, Other Structures	Machinery & Equip.	Total	Buildings, Other Structures	Machinery & Equip.
Assets, beginning of year	$16,567.8	3,970.9	12,596.8	$4,811.7	1,666.0	3,145.7
Capital expend., new	1,724.8	286.2	1,438.6	646.0	163.4	482.6
Capital expend., used	136.9	27.4	109.5	57.3	24.0	33.3
Retirements	931.1	183.0	748.1	516.1	126.1	390.1
Assets, end of year	17,498.3	4,101.5	13,396.0	5,000.2	1,727.2	3,272.0
Depreciation charges	1,121.4	161.3	960.0	654.1	157.6	496.5
Rental payments	193.1	100.8	92.3	369.9	240.9	129.0

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Capital Expenditures by Type of Textile Mill & Apparel Plant, 1980, 1981
(In Millions of Dollars)

	1981	1980	% Change 1981/1980
Textile mill products industry, total	$1,724.8	$1,488.3	+ 15.9%
Weaving mills:	742.1	645.2	+ 15.0
Cotton	289.3	217.5	+ 33.0
Man-made fiber, silk	408.7	372.2	+ 9.8
Wool, weaving & finishing mills	18.2	22.5	- 19.1
Narrow fabric mills	25.9	22.0	+ 17.7
Knitting mills, total	298.0	293.6	+ 1.5
Hosiery	22.6	27.8	- 18.7
Knit outerwear mills	50.0	48.5	+ 3.1
Knit underwear mills	17.2	21.4	- 19.6
Knit fabric mills (circular & warp knit)	106.5	129.3	- 17.6
Knitting mills, not elsewhere classified	1.6	2.6	- 38.5
Textile finishing, except wool	101.8	108.2	- 5.9
Floor covering mills	119.2	109.6	+ 8.8
Yarn & thread mills	291.0	231.5	+ 25.7
Miscellaneous textile goods	172.7	111.2	+ 55.3
Apparel & other textile products, total	646.0	607.8	+ 6.3
Men's & boys' suits & coats	35.9	29.8	+ 20.5
Men's & boys' furnishings	145.9	180.4	- 19.1
Women's & misses' outerwear	220.3	166.2	+ 32.6
Women's & children's innerwear	33.7	35.5	- 5.1
Children's outerwear	16.6	21.0	- 21.0
Hats, caps & millinery	19.8	21.8	- 9.2
Fur goods	0.3	na	--
Miscellaneous apparel & accessories	23.8	20.1	+ 18.4
Miscellaneous fabricated textile products	149.7	132.1	+ 13.3

Source: U.S. Bureau of the Census, 1980, 1981 Annual Survey of Manufactures, M81(AS)-1.

Textile Machinery in U.S. Mills

Cotton System Spindles

	May		Annual Average	
	1983	1982	1982	1981
Spindles in place (thous.)	15,855	16,945	16,086	16,744
Spindles active (thous.)	14,099	15,271	14,179	15,435
Hours operated per active spindle (thous.)*	520	428	5,487	5,885
% of spindles active on:				
100% cotton	37.3	36.6	36.7	36.4
100% man-made fiber	13.2	13.6	13.7	14.0
Other fibers & blends	49.5	49.8	49.6	49.5
Total spindle hours operated (millions)	7,331	6,541	81,455	91,857

*End of period

Source: American Textile Manufacturers Institute, Inc.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Machinery in U.S. Mills

Knitting Machines Producing Knit Fabrics

	Number Operating on Last Working Day of Year	
	1981	1980
Total knit fabric machinery	31,619	34,485
Warp knit yard goods, total	6,322	7,159
Tricot, simplex & milanese	4,085	4,579
Raschel, raschel-crochet	2,237	2,580
Weft knit yard goods, total	25,297	27,326
Single circular knit, excluding high pile	13,863	13,776
Single circular knit high pile:		
Silver knit & spring needle	3,352	3,058
Velour & terry cloth	922	1,133
Double knit & interlock	6,539	8,368
Rib, other than double knit & interlock	4,895	5,182

Broad Woven Fabric Machinery

	Number in Place			
	At End of 1st Qtr.		At End of Year	
	1983	1982	1982	1981
Looms, total	217,646	244,797	213,454	250,966
Single shuttle cam looms	121,032	135,194	120,193	140,636
Single shuttle dobby looms	29,471	43,697	29,980	44,242
Multiple shuttlebox or head motion looms	12,374	12,314	11,044	13,419
Double shuttle pile & plush jacquard looms	6,990	7,582	6,848	7,847
Shuttleless looms & weaving machines	47,779	45,290	45,389	44,822
Single filling insertion capability	33,997	34,077	32,494	34,261
Multiple filling insertion capability	13,782	11,213	12,895	10,561

By Mill Type

	First Quarter		At End of Year	
	1983	1982	1982	1981
Broad woven fabrics:	188,175	244,013	188,485	233,821
Cotton fabrics	60,513	66,100	62,086	70,019
Man-made fabrics	125,723	155,588	124,536	161,726
Wool fabrics	1,939	2,325	1,863	2,076
Tire cord & tire fabrics	1,047	1,154	1,029	1,183

(continued)

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Machinery in U.S. Mills

By Mill Type
(continued)

	Number at Year End	
Narrow fabrics: (In Place)	1982	1981
Tape looms	4,344	4,430
Up to 36 weaving spaces	2,912	2,920
37 to 49 weaving spaces	527	519
50 to 99 weaving spaces	848	947
100 weaving spaces & over	57	44
Webbing looms	1,260	1,383
Up to 12 weaving spaces	999	1,099
13 to 24 weaving spaces	118	155
25 to 36 weaving spaces	51	32
37 weaving spaces & over	92	97
Multiple or gang shuttle elastic looms	359	470
36 spaces & under	171	181
38 to 58 spaces	107	154
60 spaces & over	81	135
Shuttleless elastic looms	3,082	3,355
Braiders	68,398	68,563
13 carriers & under	15,004	15,688
14 to 33 carriers	38,931	37,987
34 carriers & over	14,463	14,888

Source: U.S. Bureau of the Census,
Current Industrial Reports, MQ-22T, MA-22G

TEXTILE MACHINERY INDUSTRY

The Textile Machinery Industry (SIC 3552)*

	1982(e)	1981	1980	% Change 1982/1981	% Change 1981/1980
Number of establishments**	na	na	574	--	--
Employees, total (thous.)	19.9	22.9	24.3	- 13.1%	- 5.8%
Production workers, (thous.)	13.2	15.7	16.8	- 15.9	- 6.5
Value added by manufacture (mil. $)#	$ 695.0	$ 776.7	$ 715.3	- 10.5	+ 8.6
Value of industry shipments (mil. $)##	1,140.0	1,245.0	1,170.5	- 8.4	+ 6.4
Exports as a % of product shipments	27.9%	31.5%	34.9%	--	--
Imports as a % of apparent consumption	42.6	44.2	46.9	--	--

(e) = estimated by U.S. Bureau of Industrial Economics (1983 U.S. Industrial Outlook).
na = not available
*SIC (Standard Industrial Classification) Industry 3552 covers establishments primarily engaged in manufacturing machinery for the textile industries, including parts, attachments and accessories. It does not include manufacturers of domestic or industrial sewing machines (SIC 3636).
**Each business location is counted as a separate establishment

(footnotes continued)

Shipments

(Footnotes continued)

#Value added by manufacture is derived by subtracting the cost of materials, supplies, containers, fuel, purchased electricity and contract work from the value of shipments. The result of this calculation is then adjusted for value added by merchandising operations and for inventories. This measure avoids the duplication in the figure for value of shipments which results from the use of products of some establishments as materials by others, and it is considered the best value measure for comparing the relative economic importance of manufacturing among industries.

##Includes the net selling values of all products shipped, both primary and secondary, as well as miscellaneous receipts. The value of textile machinery shipped within this industry (SIC 3552), as well as secondary producers classified in other industires, is shown in the following table, covering value of product shipments.

Value of Shipments of Textile Machinery by All U.S. Producers, 1979, 1980, 1981
(Millions of Dollars)

	1981	1980	1979	% Change 1981/1980	% Change 1980/1979
Textile machinery, total	$1,144.5	$1,123.2	$1,057.3	+ 1.9%	+ 6.2%
Textile machinery, except parts & attachments	469.4	474.2	453.4	- 1.0	+ 4.6
Textile machinery parts & attachments	586.7	571.3	542.4	+ 2.7	+ 5.3
Textile machinery, not specified by kind	88.3	77.7	61.4	+ 13.6	+ 26.5

Source: U.S. Bureau of the Census, 1981 Annual Survey of Manufactures, M81(AS)-2.

According to estimates by the U.S. Bureau of Industrial Economics, shipments of U.S. textile machinery in 1982 declined about 14% compared with 1981 after adjusting for inflation. Between 1972 and 1982, shipments declined at a compound annual rate of 4.9% as world economic conditions deteriorated. However, with a decline in interest rates and in the face of the competitive pressures the domestic textile and apparel industries are facing, a pickup is expected in 1983. World markets, too, are expected to improve, although U.S. manufacturers are not expected to regain technological parity with overseas manufacturers of high production weaving and winding equipment or high production ringless spinning, knitting and printing machinery. They are expected to remain competitive in yarn preparation equipment, including ring spinning and roving, as well as finishing and dyeing equipment.

Improved quality of yarn preparation will be necessary to take full advantage of high speed production equipment. This will open additional markets for machinery for opening cleaning, carding, drawing and warp preparation.

TEXTILE MACHINERY INDUSTRY

Shipments

Computer-controlled monitoring or production is being accepted in the industry. This makes it possible not only to control the quality of the end product, but to make major savings in energy consumption, a major consideration in the industry.

Foreign Trade

Imports of textile mill machinery continue to be a major concern to domestic producers. Between 1981 and 1982, the U.S. Department of Commerce reported that the volume of mill equipment imported fell 6.1% to $630,190,000 from $671,064,000. Despite this decline, imports reportedly accounted for 43% of all domestic purchases in 1982. Weaving equipment and parts were the most commonly imported piece of machinery in 1982, accounting for 38% of the total, while spinning equipment and parts represented 17% of the total. The largest exporters of textile equipment to the U.S. were West Germany and Switzerland accounting for 33% and 31% of U.S. imports respectively.

Exports of textile machinery fell to $272 million in 1982, off 18.7% from the previous year. The European Economic Community was the largest purchaser of the equipment, taking 20% of U.S. exports while Canada and Mexico took 13% each. Exports in 1982 are estimated to account for approximately 28% of total product shipments in that year.

A recent survey of the industry indicates that about 80% of the worlds textile mill equipment has been operating for more than 10 years with an estimated 50% in operation for more than 20. For this reason many analysts believe that many of the worlds textile mills will begin to modernize their operations within the next five years. A major obstacle to U.S. producers gaining a large share of the perceived world growth in the coming years is the perception that U.S. producers are less competitive with regard to price and technology in the weaving and ringless spinning areas. However, it is estimated that shipments of U.S. producers will grow at a real 2% annual rate through 1988.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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